



Department of Energy

EM Consolidated Business Center Project

September 2002



The Greentree Group

Introduction

- Professional Small Business consulting firm specializing in:
 - Business and logistics systems support
 - Program Management assistance
 - Financial Management advisory services
 - Business Process Re-engineering
 - Application of IT solutions to successfully support business functions

Introduction (cont.)

- Founded February 1993
- 70 Employees
- Headquarters - Beavercreek, OH
- Two Operating Locations
 - Richmond, VA and Dallas, TX
- U.S. and International Work
 - DoD, Federal and Commercial Clients



Site Consolidation Experience

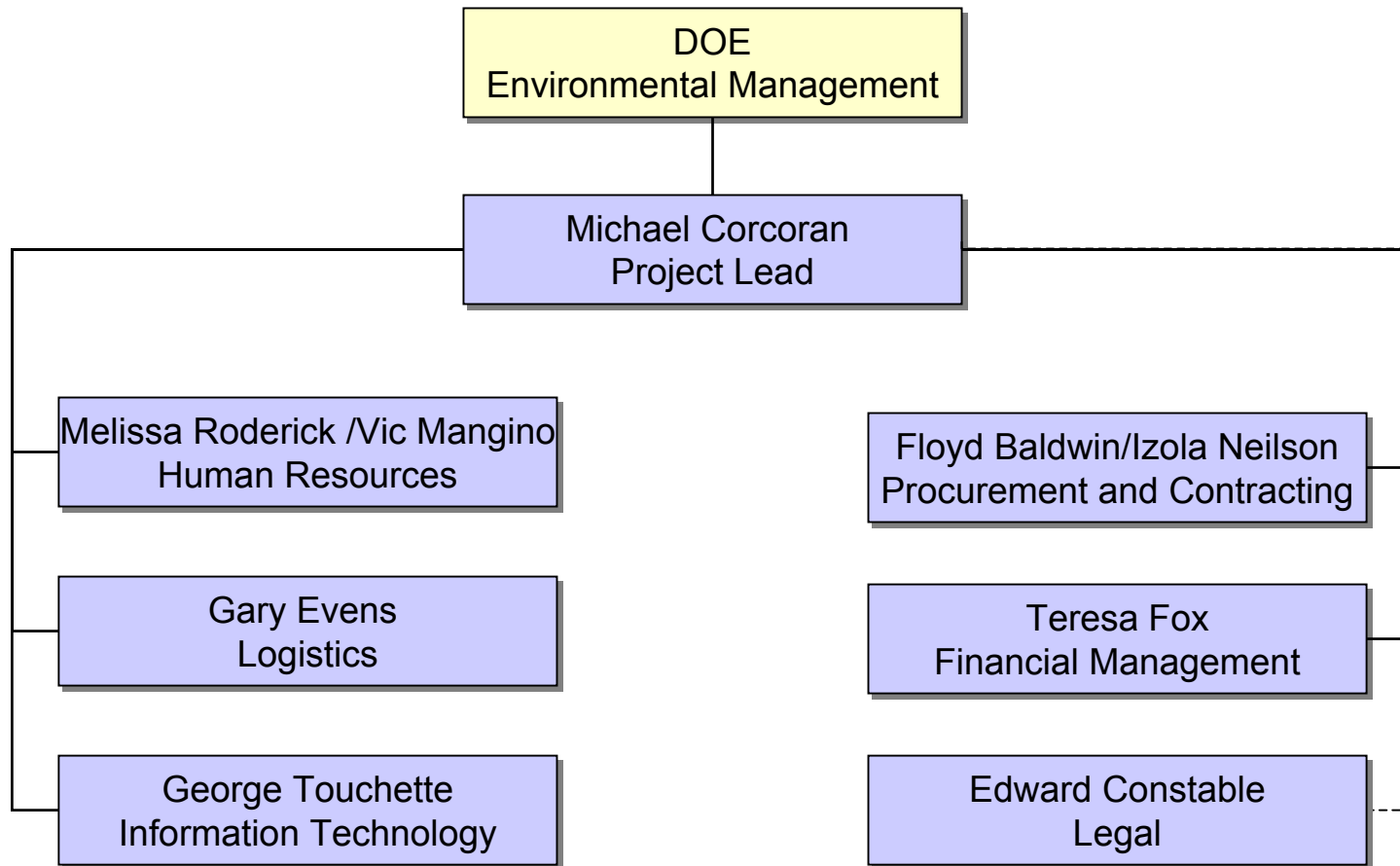
Site Consolidation Experience

- Assisted Community Leaders, Local Governments, State of Ohio, Ohio Delegation in preparation for “BRAC”
 - Base Realignment and Closure (BRAC) Commission Support
 - Performed in-depth analysis and provided recommendations to BRAC task force
- Base Closures Overseas and Relocation of Forces
 - Tactical Fighter Wing relocation to CONUS
 - Shipped equipment, relocated personnel & disposed of assets
 - Identified & activated new facilities

Site Consolidation Experience (cont.)

- Closure of Army and Air Force Exchange Service (AAFES) Facilities
 - Facility closure
 - Relocation of personnel
 - Redistribution & disposal of equipment/assets
 - Activation of business support operations at new location

Greentree's DOE Consolidation Project Team





Planned Site Consolidation Project Approach

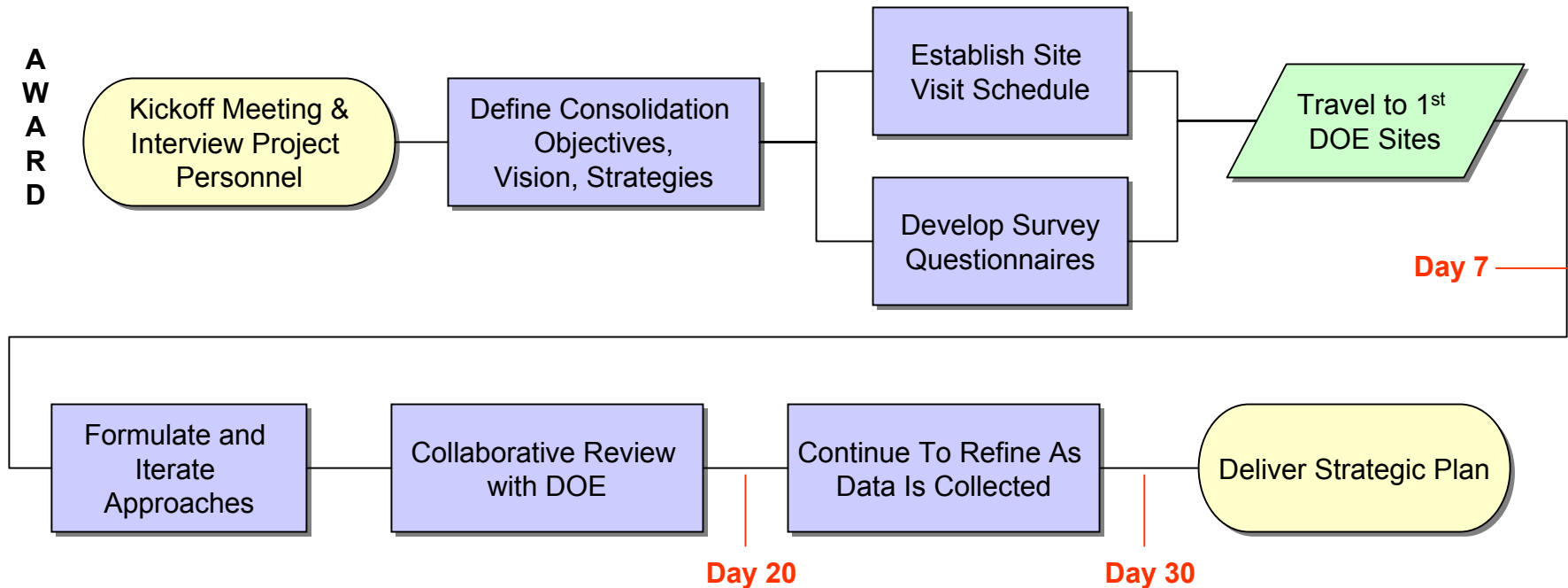
Objectives for Site Visits

- Meet site personnel and identify functional POCs
- Establish working relationships in each functional area
 - Begin dialogue with sites
- Gather information/data from general and functional perspective
 - To support EM consolidation planning process
 - Questionnaires/Interviews/Observations
- Seek input and feedback about planning process and consolidation requirements
 - All stakeholders have a voice in the consolidation plan
 - You are the experts about your mission and your people

Major Milestones

- Site Visits— Sept '02
- Strategic Plan— Oct '02
- Plan of Actions and Milestones (POAM)
- Publish POAM and report— Mar '03
 - Define organization, charter, functions and staffing for Consolidated Business Center (CBC)
 - Provide detailed, step-by-step procedures needed to stand-up the CBC for each site and location

Strategic Plan Process Flow



Outline of Strategic Plan

Table of Contents

- | | |
|-------------------------------------|---|
| 1. Consolidation Concept | 8. Management Impacts and Planning by Functional Area |
| 2. Vision Statement | |
| 3. Objectives | |
| 4. Assumptions and Constraints | 9. Suggested Timeframes |
| 5. Strategies to Achieve Objectives | 10. Risk Factors and Barriers |
| 6. Employee Impacts and Planning | 11. Communications Strategies |
| 7. Union Impacts and Planning | a. Communication Considerations |

Desired Site Information

- Roles and responsibilities?
- Organizational structure?
- How do you perform your function?
 - Processes/Procedures/Policies/Information Technology?
- Do you support only this site or multiple sites?
 - What level of support do you provide?
- Are you supported by another site? What level of support? POC?
- Number of personnel performing function with job series & position descriptions?
- Issues/Concerns/Potential Problem areas?
- Recommendations regarding consolidation?

Summary

- We recognize the importance of this consolidation to the Department of Energy's Office of Environmental Management and its field operational sites
- We understand importance of business support operations continuity for each EM site
- All stakeholders have a voice in planning process
 - Establish close working relationship with site management and subordinate personnel
 - Actively seek input from site personnel at each site— you are the experts about your mission and your people

Goal: Continuous mission-effective and cost-effective business support operations

Summary

- Keep all affected personnel informed throughout project planning and execution phases
 - Communicate, Communicate, Communicate!!!
 - Need your input and suggestions
- We recognize the importance of people, careers, livelihoods, family ties & family moves
 - Maintain awareness of the human element of consolidation throughout the project

Be sensitive to people, their feelings and their families

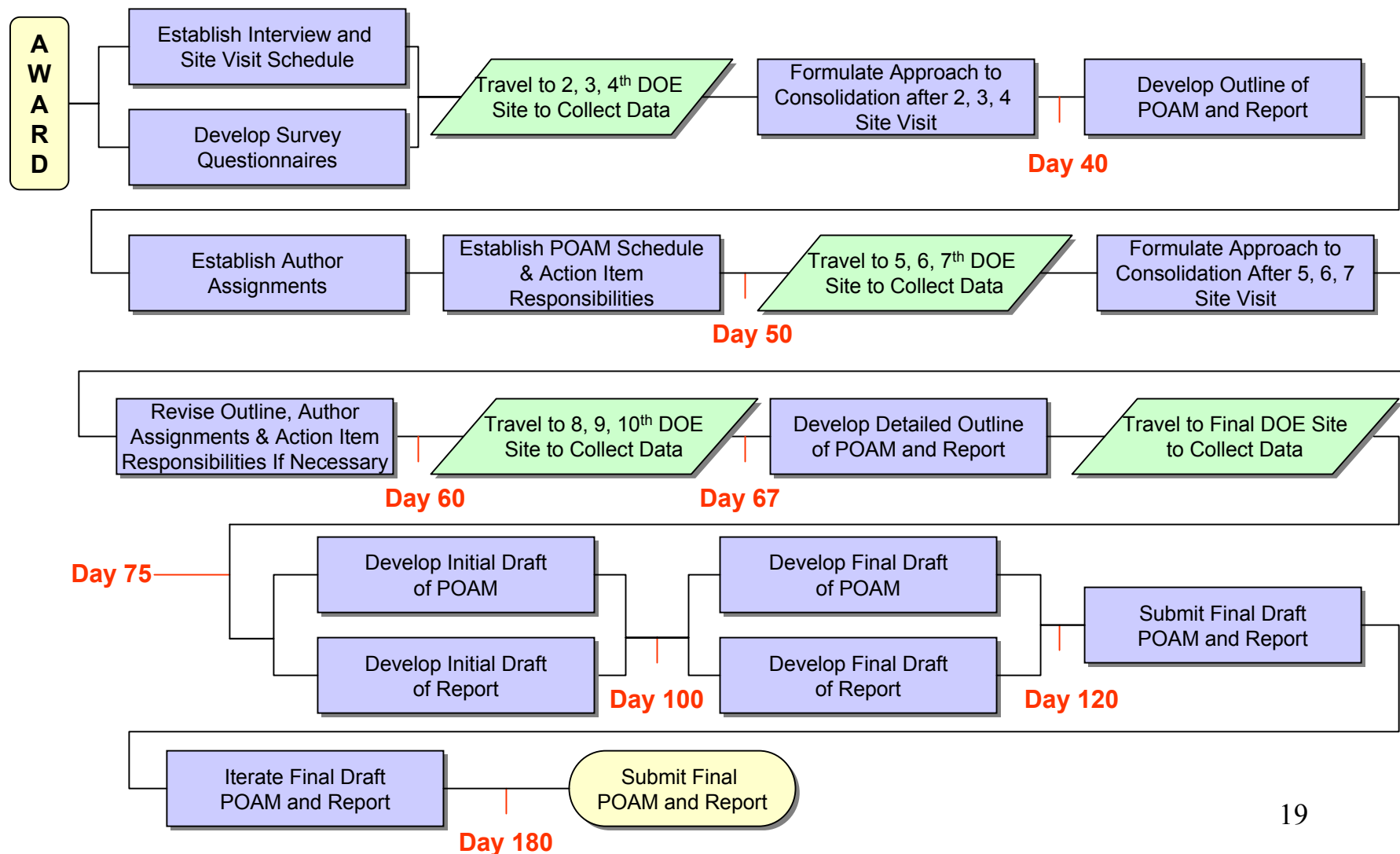
Greentree's DOE Consolidation Project Team

Name	Phone	Email Address
Mike Corcoran	(937) 490-5524	mcorcoran@greentreegroup.com
Paul Cox	(937) 490-5518	pcox@greentreegroup.com
Teresa Fox	(937) 490-5529	tfox@greentreegroup.com
Larry Faessler	(937) 490-5530	lfaessler@greentreegroup.com
Melissa Roderick	(937) 490-5509	mroderick@greentreegroup.com
Floyd Baldwin	(937) 490-5514	fbaldwin@greentreegroup.com
Gary Evens	(937) 490-5513	gevens@greentreegroup.com
George Touchette	(937) 490-5512	gtouchette@greentreegroup.com
Ed Constable	(937) 426-4300	ed.constable@daytonaero.com
Victor Mangino	(937) 490-5562	vmangino@greentreegroup.com
Izola Neilson	(937) 490-5563	ineilson@greentreegroup.com
Joan Davis	(937) 490-5517	jdavis@greentreegroup.com



THE GREENTREE GROUP

POAM Report Process Flow



Outline of POAM and Detailed Planning Documents

Table of Contents

1. Pertinent Considerations for Consolidation
2. Consolidation Requirements
3. Consolidation Issues
4. Detailed Plan of Actions and Milestones (POAM)
5. Proposed Organization
 - a. Organization Chart
 - b. Service Center Mission Statement
 - c. Organization Functions
 - d. Organizational Responsibilities
 - e. Organizational Staffing
 - f. Position Descriptions
6. Strategies for Mitigating Effect on Personnel
7. Detailed Transition Plans
 - a. Demobilizing Functions
 1. Legal
 2. Information Technology
 3. Logistics
 4. Human Resources
 5. Procurement and Contracting
 6. Financial Management
 - b. Mobilizing and Start-up of Consolidated Service Center
 1. Legal
 2. Information Technology
 3. Logistics
 4. Human Resources
 5. Procurement and Contracting
 6. Financial Management